

## **STEP THREE**

### **Planning**

## STEP THREE--Planning

### Step Three Planning to Implement Patient and Family Education

#### QUESTIONS TO CONSIDER:

1. **WHO's** going to do PFCE?
  - A. Who has time?
  - B. Who has adequate staffing?
  - C. What is the role of (insert each staff position) in PFCE?
2. **WHO's** going to select and/or develop and Inventory PFCE materials? (Pamphlets, etc.)
3. **WHEN** is PFCE going to be done?
  - A. Physician's orders?
  - B. Standing Order?
  - C. Initiated by Nurse other health professionals?
4. **WHERE** is PFCE going to occur?
  - A. Classroom/Conference Room?
  - B. Exam Room?
  - C. Lobby?
  - D. Other?
5. **What's** going to be taught?
  - A. What programs are going to be developed?
  - B. What input will each department have?
6. **HOW** will programs be evaluated? A key to successful PI is the continuous assessment of the outcomes.
  - A. How will outcomes be measured?
  - B. Who will develop recommendations for improved processes?

#### Developing PFCE Policy and Procedure Manuals

Policy and Procedure Manuals are developed according to the assessed needs of the population served. (See the Supplemental Section.) Each department will develop a departmental Policy and Procedure Manual on PFCE that addresses and incorporates:

1. Title Page
2. Introduction
3. Definition of Terms
4. Mission, Vision, Philosophy of Care
5. Purpose/Goals of Practice
6. Functions and Responsibilities
7. General Functions
8. Responsibilities of Clients, Informed Consent
9. Additional Sections for (as desired) date each page
  - Procedures
  - Standing Orders
  - Protocols
10. Orientation Program
11. In-service Education, Continuing Education
12. Quality Assurance, TQM, PI
13. Policies and Procedures Approved by the Governing Board, Medical Staff and Administration
14. Copies Of Current Disaster and Fire Manual
15. Infection Control
16. Safety Policies
17. Preventive Maintenance/Electrical on any Program equipment
18. Organization Chart - Specific to the department with documented relationships to Medical Staff, if any, and Administration (direct or indirect). Dated. Narrative statement also recommended.
19. Organization chart - copy of current, dated, hospital-wide chart on file in the Policy and Procedure manual.
20. Hours of operation, weekends, after-hours, or on call-coverage method.

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21. Job descriptions - for each employee, dated.
22. Record of licenses, registration numbers with dates of expiration, updated regularly and filed in Personnel according to clinic/hospital policy for ongoing verification of current licensure including any teaching or State licenses, certification, RN licensure, CPR, Red Cross, Etc.
23. Copies of respective sections of JCAHO - and other appropriate standards and regulations.

Suggested additional contents for a patient education policy and procedure manual.

Annual Patient Education Work Plan  
Budget/Spending Plans for Patient Education  
Clinic/Hospital Organizational Chart  
Any Grant Proposals for Patient Education  
Goals and Objectives Statement  
Monthly Reports  
Quarterly Reports  
Year End Reports  
Informed Consent  
Patient Right's and Responsibilities  
Personnel  
Quality Assurance  
Position Description  
Scope of Work for Patient Education  
Any Strategic Planning for Patient Education  
Workshops/Training/In-Service Education documentation

### **Position Descriptions should contain:**

1. Scope of Work on Patient, Family, Caregiver Education
2. Measurable criteria on patient education with specific performance standards.

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### STEP THREE CHECK LIST PLANNING

Planning to meet the following has been completed:

- \_\_\_ **WHO's** going to do PFCE?
  - \_\_\_ Time
  - \_\_\_ Who will do PFCE
  - \_\_\_ The role of each staff position in PFCE has been determined.
- \_\_\_ Each department has selected and/or develop and Inventory PFCE materials.
- \_\_\_ It has been determined **WHEN** is PFCE going to be completed.
- \_\_\_ Referral procedures have been developed.
- \_\_\_ **WHERE** is PFCE going to occur has been determined.
- \_\_\_ Lesson or teaching plans has been developed by every department.
- \_\_\_ A method of program evaluation is developed to provide continuous assessment of the outcomes.
  
- \_\_\_ Position Descriptions have been assessed for a Scope of Work on PFCE
- \_\_\_ Position Descriptions have measurable criteria on patient education with specific performance standards.

Departmental Policy and Procedure Manuals are being developed that contain the following:

- \_\_\_ Title Page
- \_\_\_ Introduction
- \_\_\_ Definition of Terms
- \_\_\_ Mission, Vision, Philosophy of Care
- \_\_\_ Purpose/Goals of Practice
- \_\_\_ Functions and Responsibilities
- \_\_\_ General Functions
- \_\_\_ Responsibilities of Clients, Informed Consent
- \_\_\_ Additional Sections (as desired) Date each page
  - \_\_\_ Procedures
  - \_\_\_ Standing Orders:
  - \_\_\_ Protocols
- \_\_\_ Orientation Program
- \_\_\_ In-service Education, Continuing Education
- \_\_\_ Quality Assurance
- \_\_\_ Policies and Procedures Approved by the Governing Board, Medical Staff and Administration
- \_\_\_ Copies Of Current Disaster and Fire Manual
- \_\_\_ Infection Control
- \_\_\_ Safety Policies
- \_\_\_ Preventive Maintenance/Electrical on any Program equipment
- \_\_\_ Organization Chart - Specific to the department with documented relationships to Medical Staff, if any, and
  - \_\_\_ Administration (direct or indirect). Dated. Narrative statement also recommended.
- \_\_\_ Organization chart - copy of current, dated, hospital-wide chart on file in the Policy and Procedure manual.
- \_\_\_ Hours of operation, week-ends, after-hours, or on call-coverage method.
- \_\_\_ Job descriptions - for each employee, dated.
- \_\_\_ Record of licenses, registration numbers with dates of expiration, updated regularly and filed in Personnel according to clinic/hospital policy for ongoing verification of current licensure including any teaching or State licenses, certification, RN licensure, CPR, Red Cross, Etc.
- \_\_\_ Copies of respective sections of JCAHO - and other appropriate standards and regulations.

Suggested additional contents for a patient education policy and procedure manual

- \_\_\_ Annual Patient Education Work Plan

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- \_\_\_ Budget/Spending Plans for Patient Education
- \_\_\_ Clinic/Hospital Organizational Chart
- \_\_\_ Any Grant Proposals for Patient Education
- \_\_\_ Goals and Objectives Statement
- \_\_\_ Monthly Reports
- \_\_\_ Quarterly Reports
- \_\_\_ Year-End Reports
- \_\_\_ Patient Right's and Responsibilities
- \_\_\_ Personnel File
- \_\_\_ Quality Assurance
- \_\_\_ Position Descriptions
- \_\_\_ Scope of Work for Patient Education
- \_\_\_ Any Strategic Planning for Patient Education
- \_\_\_ Workshops/Training/In-Service Education documentation